FREQUENTLY ASKED QUESTIONS

Provider Maintenance

Client Maintenance

How do I add a Staff/Household member to a Provider's record?

Individuals can be added to the provider's record directly from the Staff/Household member window.

1. Click on [License] button on main window.
2. Search for Provider.
3. Select the Application menu item.
4. Click on [Staff Qualifications] button.
5. Press [F9] for a new record.
6. Enter all required fields for new individual.

User Guide Reference – Licensing Guide: Provider Application, Staff Qualifications

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How do I remove a Staff/Household member from a Provider's record?

Individuals cannot be removed as members of the household or staff for a provider record. However, the Staff/Household member window has a field for the employment or occupancy end date. It is simply labeled "End Date".

1. Click on [License] button on main window.
2. Search for Provider.
3. Select the Application menu item.
4. Click on [Staff Qualifications] button.
5. Locate the staff or household member.
6. Enter a date in the End Date field.

User Guide Reference – Licensing Guide: Provider Application, Staff Qualifications

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How do I locate Providers who are due for License or Approval expiration?

When providers are either Licensed or Approved, a Issue Date and Expiration Date are entered on the Provider's License window. The Expiration Date defaults to one year from the issue date but that date can be manually edited. The Licensing module has a report "License Expiration Report" that can be run for a date range to locate any providers who have Expiration Date values within that date range. You can then review the providers on that report to manually take any action necessary to terminate or renew their status.

User Guide Reference – Licensing Guide: Reports, License Expiration

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How do I change Provider Rates?

Individual Provider rates should not be edited but a new rate schedule can be added for the provider.

1. Click on [Provider] button on main screen.
2. Search for Provider
3. Click on [Rates] button
4. With cursor in "Effective Date" field press [F9] for a new record.
5. Enter a new effective date.
6. Enter new rates for each care level.

User Guide Reference – Subsidy Guide: Provider Public Rates

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Can I enter Provider Rates before their effective date?

Yes, the system will use the correct rates for the time period so users can enter rates whenever they receive them from the Provider.

User Guide Reference – Subsidy Guide: Provider Public Rates

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How do I change a Provider's address or phone number?

A Provider's address or phone number can be changed in any of the 3 provider modules: Licensing, Subsidy or CCRR. However, a change to the address may impact a provider's Approval or License status so only workers responsible for the Approval or License status should make these changes.
User Guide Reference – Subsidy Guide: Provider

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Can you change a family member's employer without entering a new interview?

No, a new interview would need to be added any time that a family member changes employment. This is because once you have saved the interview and determined family eligibility, changes cannot be made to the interview.

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What do I do if a family's income has changed?

You should enter a new interview to modify the income and you should check the Eligibility Determination window of the interview to see if this income change has affected the family's eligibility.
User Guide Reference – Subsidy Guide: Client, Client Information, Interview

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What do I do if a family changes provider?

Each child's current authorization and enrollment should be terminated and new ones entered.

1. Click on the [Client] button on the main screen.
2. Search for the family.
3. Select the Child menu to open the Child window.
4. Mouse click In the Enrollment block to activate the Child menu.
5. Select the Authorization>Cancellation menu
6. Select the Authorization that needs cancelled and process the cancellation
7. Return to the Child window.
8. Enter an Enrollment termination date and a reason code.
9. Press [F9] and enter the new enrollment with the new provider.
10. Repeat for each child in the family.
11. Reassess Family Contribution if the child schedules have changed in a manner that would require a redistribution of Family Contribution.
12. Print new Authorizations for each child.

User Guide Reference – Subsidy Guide: Client, Client Information

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What do I do if a family member changes eligible activities?

If a member of the family changes any activity that may affect their eligibility status, a new interview should be entered. You should look at the Determine Eligibility window in the interview to see if this change in activity has impacted the family's Eligibility status.
User Guide Reference – Subsidy Guide: Client, Client Information, Interview

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Can I change the dates for an existing Authorization?

No, you must cancel the existing authorization and create a new one. The start date for the new authorization cannot be before the end date of the previous authorization.

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What do I do if I get a message stating that I can't delete an enrollment?

Enrollments can only be deleted before the Authorization and Attendance Roster have been created. If the enrollment is incorrect and the Authorization and Attendance Roster have been created, the Authorization needs to be cancelled. Then you can enter a new enrollment and create a new Authorization.

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What do I do if a Parent 2 leaves the family?

If Parent 2 leaves the family, that person does not need to be removed from the main parent screen. Once a Parent 2 leaves the family, a new interview should be added and that person's Include status should be changed to "N".
User Guide Reference – Subsidy Guide: Client, Client Information, Interview

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What do I do if a Parent joins the family?

The new parent can be added as Parent 2. You should enter the Parent 2 ID or let the system create one for you. You should enter the name, date of birth, and sex for Parent 2. Then a new interview should be added. You should look at the Determine Eligibility window in the interview to see if this change in activity has impacted the family's Eligibility status.
User Guide Reference – Subsidy Guide: Client, Client Information, Interview

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What do I do if a Child leaves the family?

Enter a new interview and change the child's Include flag to "N". The child record should remain as part of this family for historical purposes.
User Guide Reference – Subsidy Guide: Client, Client Information, Interview

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What do I do if a Child joins the family?

The new child can be added to the Children Needing Care window.

1. Click on the [Client] button on the main screen.
2. Search for the family.
3. Click on the [Children] button.
4. Press [F9] to create a blank record.
5. Enter all required fields
6. Click [OK] to return to the parent window.

User Guide Reference – Subsidy Guide: Client, Client Information, Parent, Children Needing Care
A new interview should then be added and that child's Include flag should be set to "Y". You should review the Determine Eligibility window in the interview to see if this change in activity has impacted the family's Eligibility status. If necessary, update the family's eligibility status. Then you can enroll the child with a provider. Once all children are enrolled, the Family Contribution should be reassessed. Then the Authorization should be created for the new child. If the Family Contribution amount or distribution has changed for the other children in the family, their old Authorizations should be cancelled and new ones created.
User Guide Reference – Subsidy Guide: Client, Client Information, Interview

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What do I do if a Child becomes too old for the Child Care Assistance Program?

If a child becomes too old for the program, a new interview should be added and that child's Include flag should be set to "N". You will then not be able to enter an enrollment for the child.

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How do I change the ID of a Parent, Child or Other Family Member?

The system has a special screen for this process to ensure that all appropriate records are updated in the system.

1. Navigate to Client>Maintenance>ID Change to open the ID change screen.
2. Select the radio button to indicate what type of ID is being changed.
3. Enter the existing ID in the Current ID field.
4. Press [TAB] to populate the window with information about the individual.
5. Enter the new ID in the New ID field.
6. Click [Execute] button to process the change.

A history record will automatically appear in the family record detailing the change.
User Guide Reference – Subsidy Guide: Client, Case Maintenance, ID Change

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How do I change the date of birth of a family member?

The Birthdate of Parent 1, Parent 2 can be changed directly in the main Parent window by typing over the existing date. Child birthdates can be changed in the Children Needing Care window by clicking on the [Children] button and navigating to the Birthdate field and typing over the existing date. Other Family Member birthdates can be changed in the Other Family Member window by clicking on the [Family] button and navigating to the Birthdate field and typing over the existing date.

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How do I change the Name of a family member?

The names of Parent 1, Parent 2 can be changed directly in the main Parent window by typing over the existing names. Child names can be changed in the Children Needing Care window by clicking on the [Children] button and navigating to the name fields and typing over the existing names. Other Family Member names can be changed in the Other Family Member window by clicking on the [Family] button and navigating to the name fields and typing over the existing names .

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How do I delete an Authorization?

Authorizations can only be deleted from the Child's Auth History window if an Attendance Roster for the enrollment has not been created.
To delete the Authorization:

1. Navigate to Client>Maintenance>Child/Enrollment and locate the child.
2. Mouse click in the Enrollment block to activate the buttons.
3. Click on [Auth History] button.
4. Select the Authorization record to be deleted.
5. Press [F10] and confirm the deletion.

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When do I need to enter a new family interview?

It is a good practice to enter a new interview any time a family contacts you to report changes in their information including address changes. This is because any changes to the family or child care situation may impact eligibility or the child care Authorizations. Additionally, new interviews should be entered during the Renewal process. The following are reasons that a new interview should be entered:

- New employer for any individual included in the family size (may impact eligibility).
- Change in income for any individual included in the family size (may impact eligibility).
- Change in eligible activity for any individual included in the family size (may impact eligibility).
- Addition of individual who counts towards the family size (may impact eligibility).
- Removal of individual who counts towards the family size (may impact eligibility).
- Parent wants to send children to a new provider (may impact Authorization).
- Child schedule at provider changes (may impact Authorization).

User Guide Reference – Subsidy Guide: Client, Client Information, Interview

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